

A large, light blue chevron graphic pointing upwards, centered on the page. It consists of two parallel lines forming a V-shape.

# ***CloudLink Configurator***

## **USER GUIDE**

**Updated August 6, 2019**

**UPTAKE**

# Table of Contents

**DISCLAIMER ..... 2**

**TRADEMARKS ..... 2**

**CUSTOMIZATION..... 2**

**CLOUDLINK CONFIGURATOR ..... 3**

**MANAGE CONFIGURATION KEYS ..... 4**

    Change ..... 4

    History..... 10

**USER PERMISSIONS..... 10**

    Customer Order to Invoice Permissions ..... 10

    EquipmentLink/Condition Monitoring Portal Permissions ..... 12

**CUSTOMER SERVICE CONTACT INFORMATION ..... 15**

## DISCLAIMER

We update CloudLink Configurator frequently. This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates. Please review the most current version of this guide regularly and with care.

## TRADEMARKS

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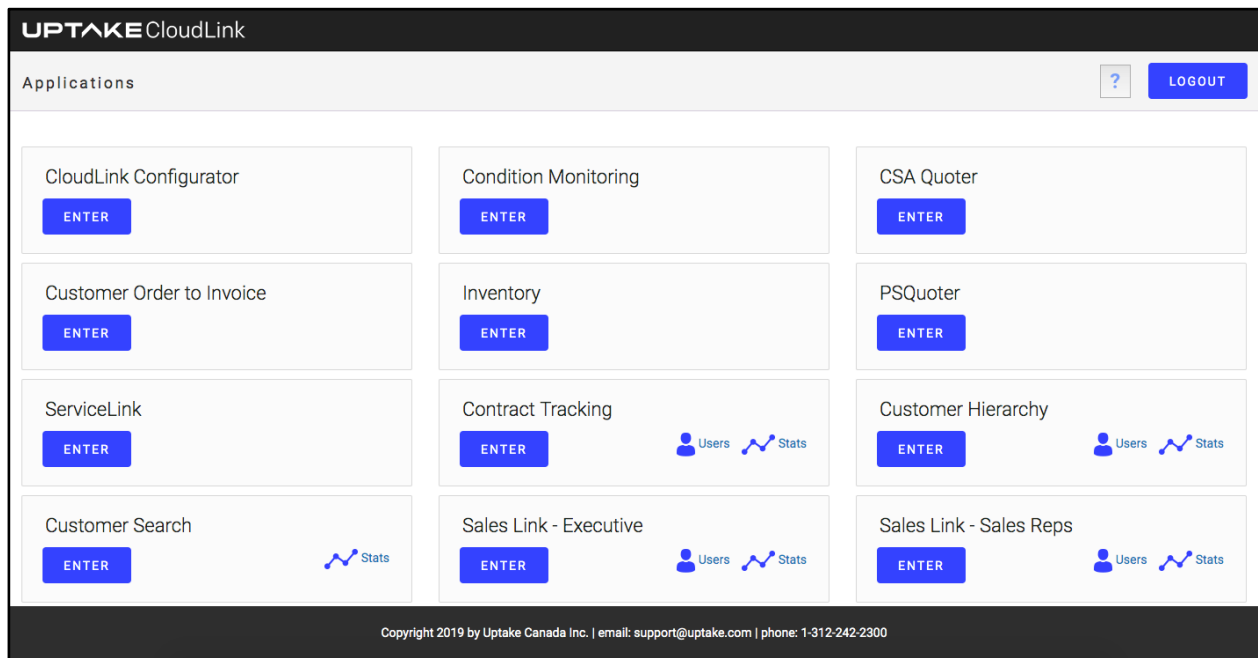
## CUSTOMIZATION

This user guide will show you how to use the Cloudlink Configurator application with the assumption that your dealership has made the migration to CloudLink and Cloudlink Configurator has been set up in a standard configuration. However, it should be noted that depending on your dealership's level of customization, or if your dealership hasn't migrated to CloudLink yet, your screens may look slightly different than those shown here.

# CLouDliNK CONFIGURATOR

Log in to CloudLink with your Username and Password. You will be brought to the landing page where a tile will appear for each of the Cloudlink applications you subscribe to.

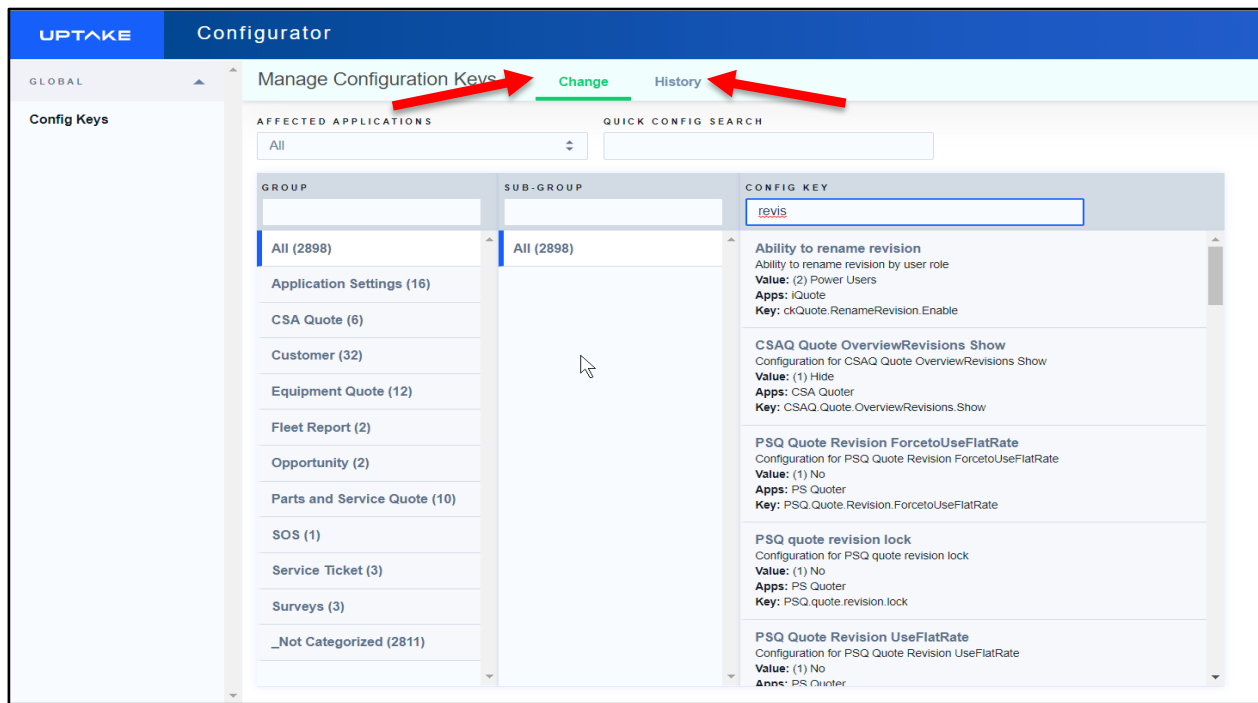
Then click the **[Enter]** button under **Cloudlink Configurator** in the upper left-hand corner.



# MANAGE CONFIGURATION KEYS

## Change

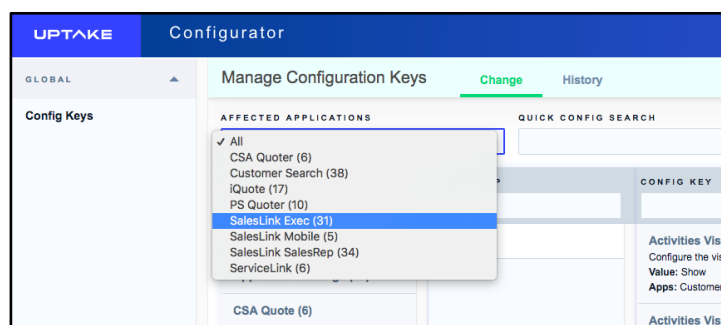
The landing page contains two tabs: **Change** and **History**.



### HOW TO MAKE A CHANGE

On the landing page, you will be directed to the **Change** tab. Select the desired application from the dropdown. The **Group** and **Sub-Group** columns below will automatically be filtered with the selected application.

For example, if you choose SalesLink Exec, this isolates the list of configuration keys down to 31.



Searching **All** applications yields the most possible results.

Here you can either scroll through the available keys. If you know the key name (or part of its name), you can start typing it in the search blank. The results begin to filter dynamically as soon as you begin to type. Below, we have chosen to search with the word 'Annual'. In this demo environment, three results are yielded.

The screenshot shows the 'Manage Configuration Keys' interface. At the top, there are tabs for 'Change' and 'History'. Below this, there are two sections: 'AFFECTED APPLICATIONS' with a dropdown menu set to 'All', and 'QUICK CONFIG SEARCH' with an input field containing 'annual'. A red arrow points to the search input field. The main content area is a table with three columns: 'GROUP', 'SUB-GROUP', and 'CONFIG KEY'. The 'GROUP' column lists various application categories like 'All (87)', 'Application Settings (16)', etc. The 'SUB-GROUP' column also lists 'All (87)'. The 'CONFIG KEY' column displays three search results:

- Annual Usage Visibility**: Configure the visibility of the Annual Usage field. Value: Show. Apps: CSA Quoter.
- Annual Use Hours Requirement**: Configures Annual Use Hours field as mandatory for customer, prospect, both or neither. Value: Optional for Both. Apps: Customer Search, SalesLink Exec, SalesLink SalesRep.
- Annual Use Hours Visibility**: Configure the Annual Use Hours field as mandatory, optional, read only or Hide information. Value: Show as Optional. Apps: Customer Search, SalesLink Exec, SalesLink SalesRep.

A closer look:

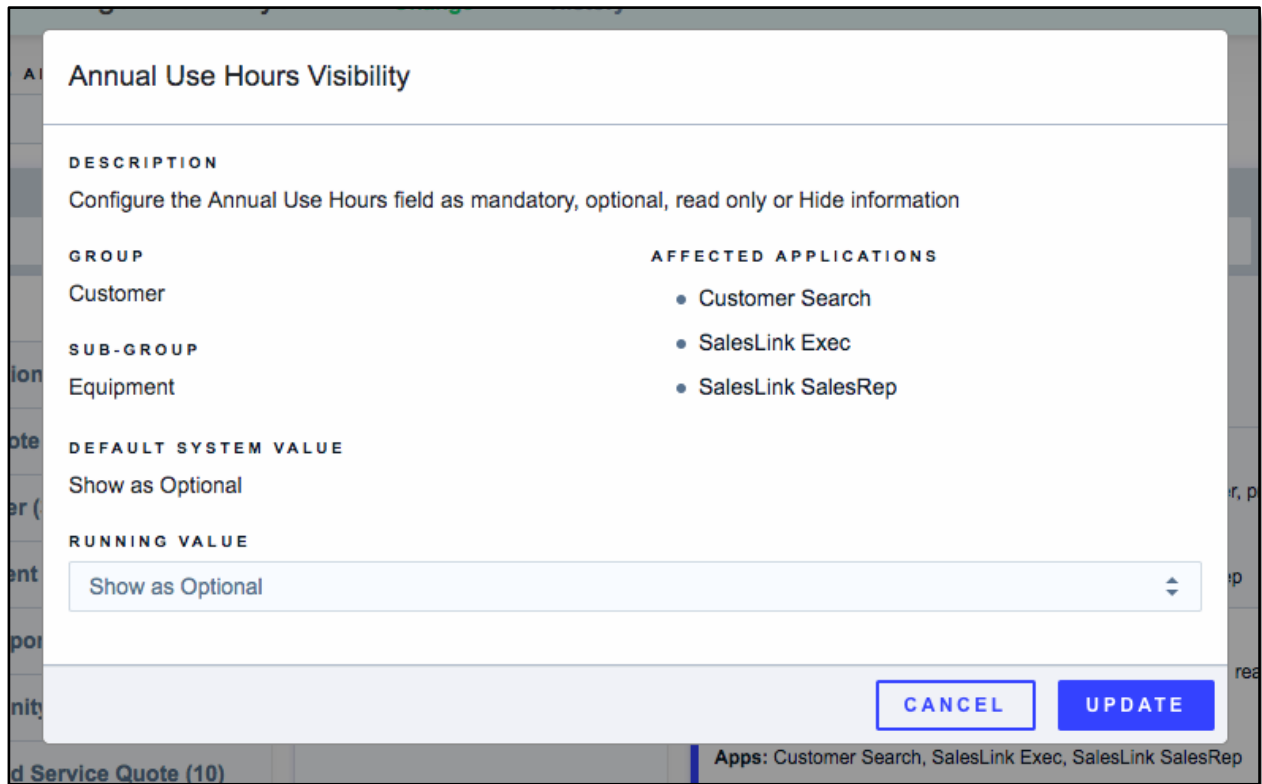
This is a close-up view of the search results for 'annual' in the 'CONFIG KEY' column. It shows the same three results as the previous screenshot:

- Annual Usage Visibility**: Configure the visibility of the Annual Usage field. Value: Show. Apps: CSA Quoter.
- Annual Use Hours Requirement**: Configures Annual Use Hours field as mandatory for customer, prospect, both or neither. Value: Optional for Both. Apps: Customer Search, SalesLink Exec, SalesLink SalesRep.
- Annual Use Hours Visibility**: Configure the Annual Use Hours field as mandatory, optional, read only or Hide information. Value: Show as Optional. Apps: Customer Search, SalesLink Exec, SalesLink SalesRep.

For each configuration key, a user can see: 1. **Description**, 2. **Value** and 3. **Impacted Applications**.

**Annual Use Hours Requirement**  
 Configures Annual Use Hours field as mandatory for customer, prospect, both or neither  
**Value:** Optional for Both  
**Apps:** Customer Search, SalesLink Exec, SalesLink SalesRep

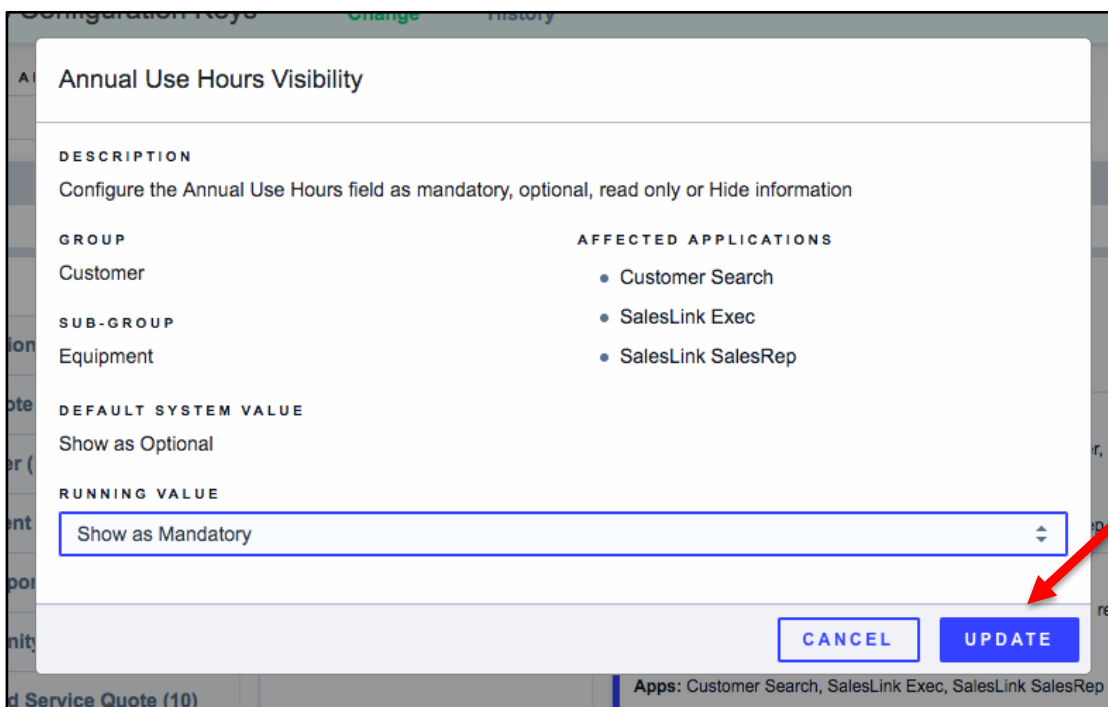
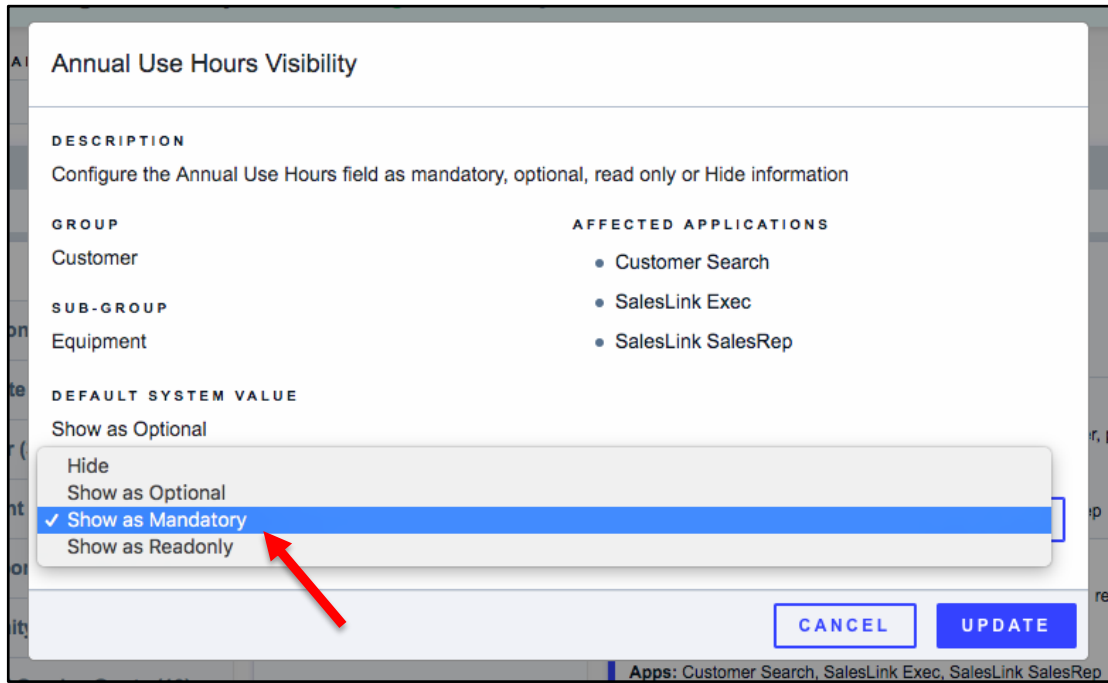
When clicked, a window will pop up to surface additional information about the key.



Below the title, you will see:

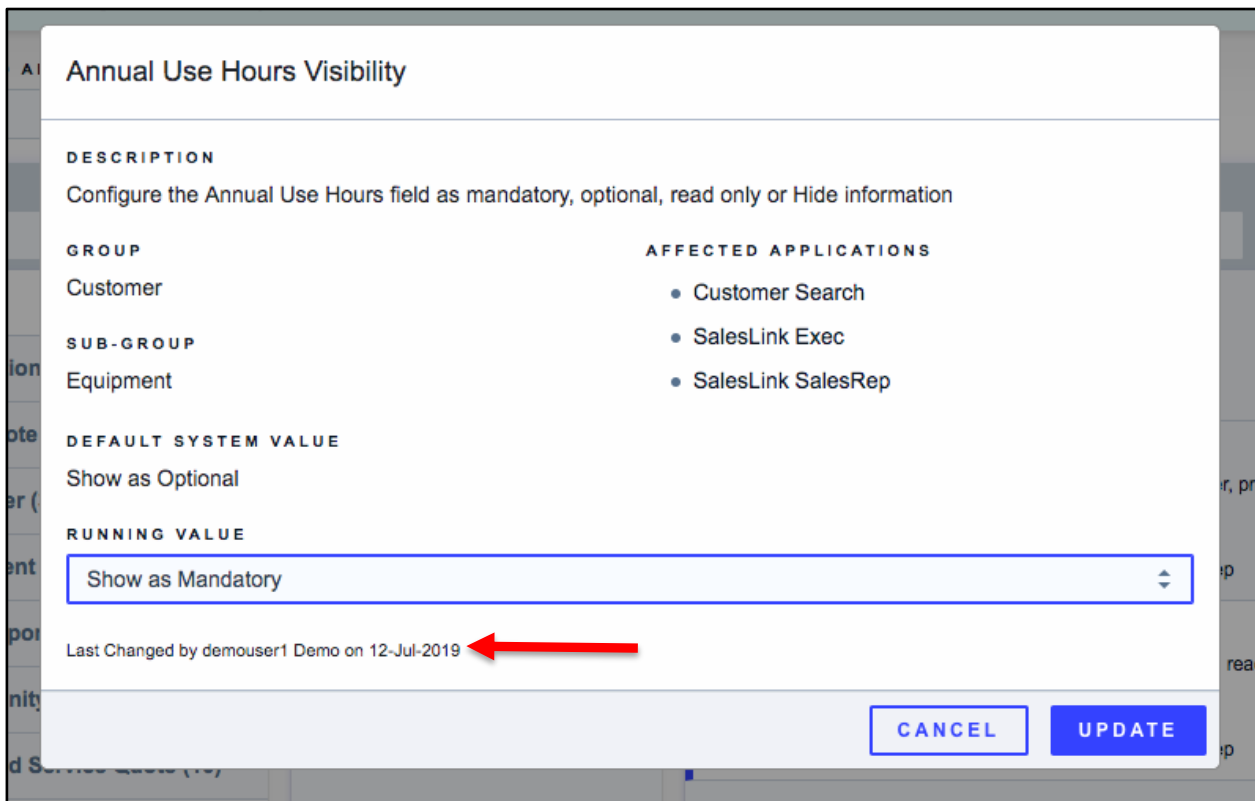
- **Description**
- **Group**
- **Sub-group**
- **Affected Applications**
- **Default System Value**
- **Running Value**

Running Value is the only one a Dealer Admin can change. Click on the right arrow to reveal the additional drop-down items. Keys may have different drop-down values which can be changed.



If you wish these hours to be Mandatory, click the value and then **[Update]**. You will then see a green **Updated Successfully** message in the lower right-hand corner.





The Last Changed message, showing username and date modified will appear below the running value.

Different Configuration Keys have different options from which to choose. Below are the options for the Annual Use Hours Requirement.

**Annual Use Hours Requirement**

**DESCRIPTION**  
Configures Annual Use Hours field as mandatory for customer, prospect, both or neither

**GROUP**  
Customer

**AFFECTED APPLICATIONS**

- Customer Search
- SalesLink Exec
- SalesLink SalesRep

**SUB-GROUP**  
Equipment

**DEFAULT SYSTEM VALUE**  
Optional for Both

**RUNNING VALUE**

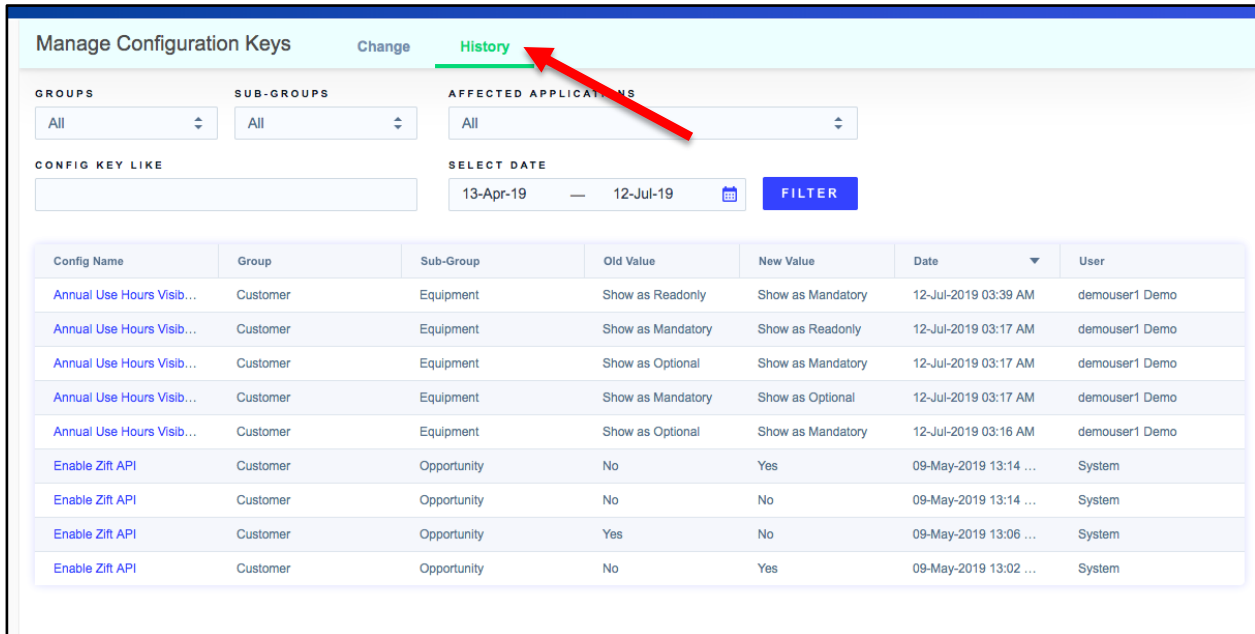
- ✓ Optional for Both
- Mandatory for Real Customers
- Mandatory for Prospect Customer
- Mandatory for Both

**CANCEL** **UPDATE**

Apps: Customer Search, SalesLink Exec, SalesLink SalesRep

## History

In this History tab, one can see all the changes which have been made. You can see all of the changes that have been made in the chosen Configuration Key. You can filter by configuration key, application, and/or date range to see the changes which have been made, or type a key word or partial key name in the **Config Key Like** blank. The History tab currently archives all changes every made in CloudLink Configurator.



Config Name	Group	Sub-Group	Old Value	New Value	Date	User
Annual Use Hours Visib...	Customer	Equipment	Show as Readonly	Show as Mandatory	12-Jul-2019 03:39 AM	demouser1 Demo
Annual Use Hours Visib...	Customer	Equipment	Show as Mandatory	Show as Readonly	12-Jul-2019 03:17 AM	demouser1 Demo
Annual Use Hours Visib...	Customer	Equipment	Show as Optional	Show as Mandatory	12-Jul-2019 03:17 AM	demouser1 Demo
Annual Use Hours Visib...	Customer	Equipment	Show as Mandatory	Show as Optional	12-Jul-2019 03:17 AM	demouser1 Demo
Annual Use Hours Visib...	Customer	Equipment	Show as Optional	Show as Mandatory	12-Jul-2019 03:16 AM	demouser1 Demo
Enable Zift API	Customer	Opportunity	No	Yes	09-May-2019 13:14 ...	System
Enable Zift API	Customer	Opportunity	No	No	09-May-2019 13:14 ...	System
Enable Zift API	Customer	Opportunity	Yes	No	09-May-2019 13:06 ...	System
Enable Zift API	Customer	Opportunity	No	Yes	09-May-2019 13:02 ...	System

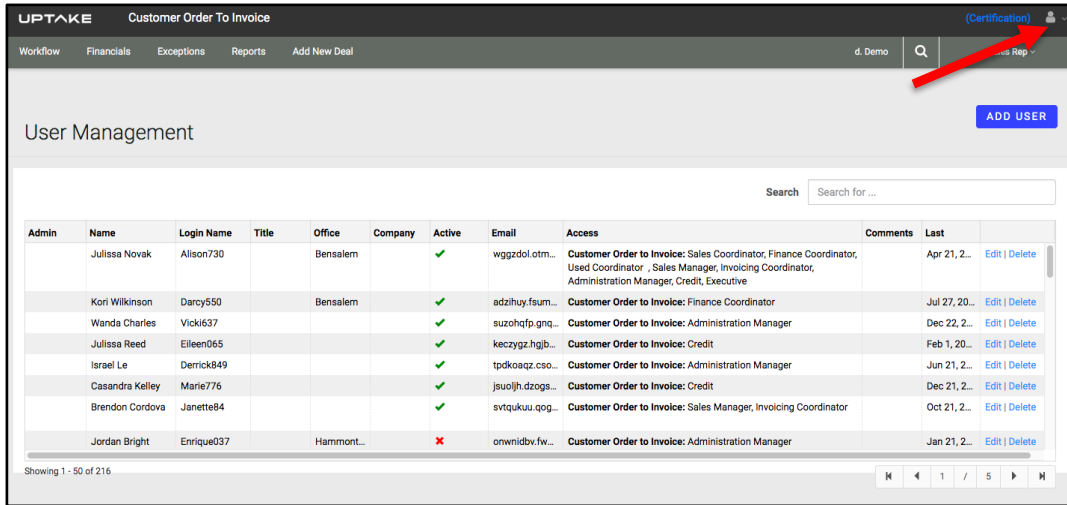
## USER PERMISSIONS

### HOW TO CHANGE WHO HAS ACCESS TO MAKE A CONFIGURATION CHANGE

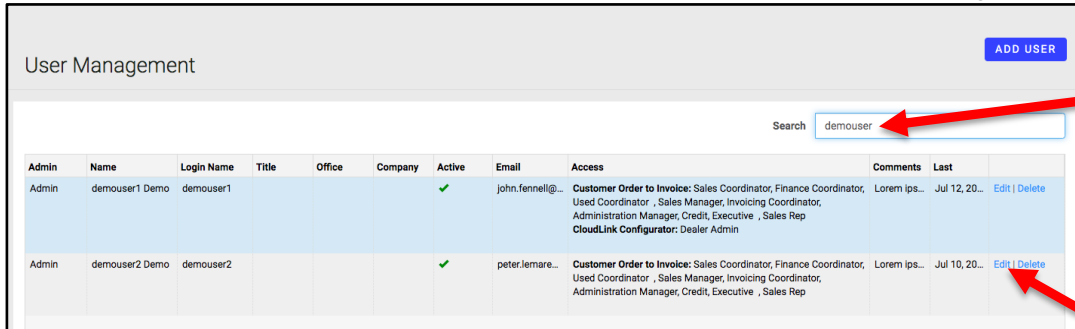
#### Customer Order to Invoice Permissions

For the dealers who have **COTI**, the Dealer Admin user has access to the UserAdmin module. Here, they give or revoke access to Cloudlink applications.

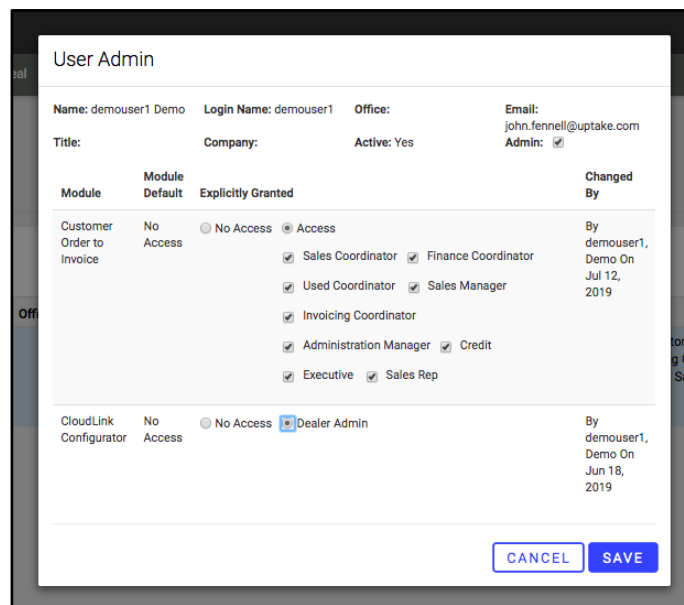
First, navigate to **User Management**, located under the Edit Profile person icon in the upper right-hand corner:



To add or delete access to a user, Search for the user name in the upper right search box.

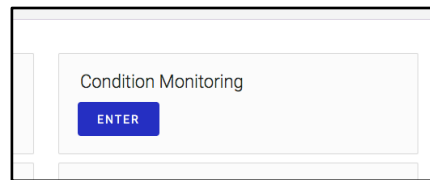


This will isolate the user list. Choose the user you wish to alter their access by clicking on the **[Edit]** button to the right of the user row. A modal window will now display, revealing access for the specific user.

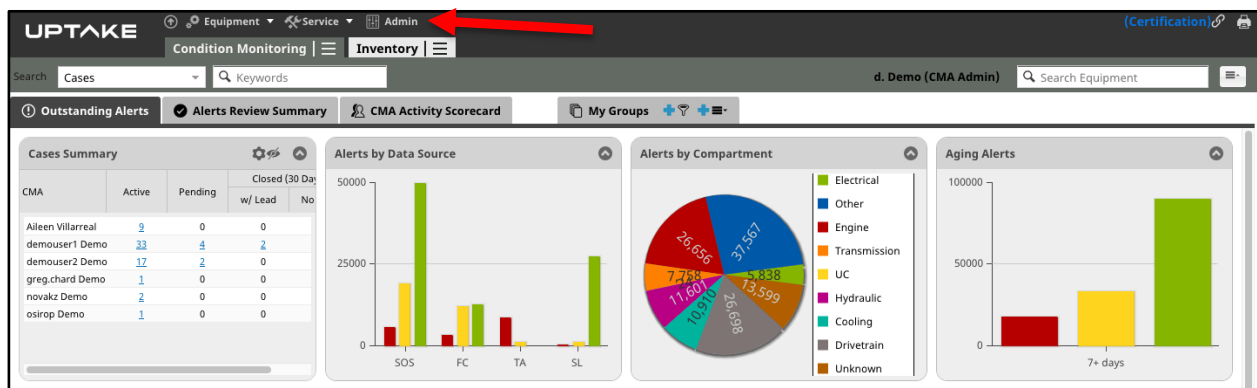


## EquipmentLink/Condition Monitoring Portal Permissions

For dealers who choose to use EL/CMP, you will utilize a similar user admin module.

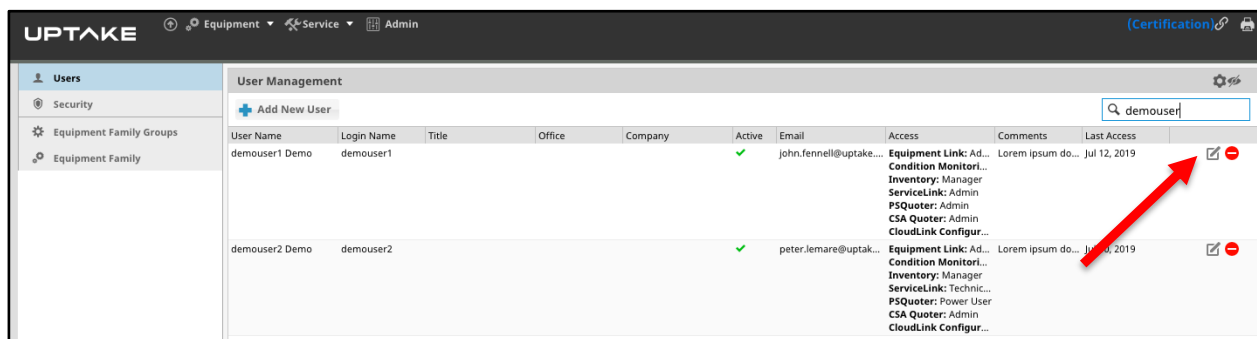


On the landing page, you'll see the Admin button at the top near the middle.

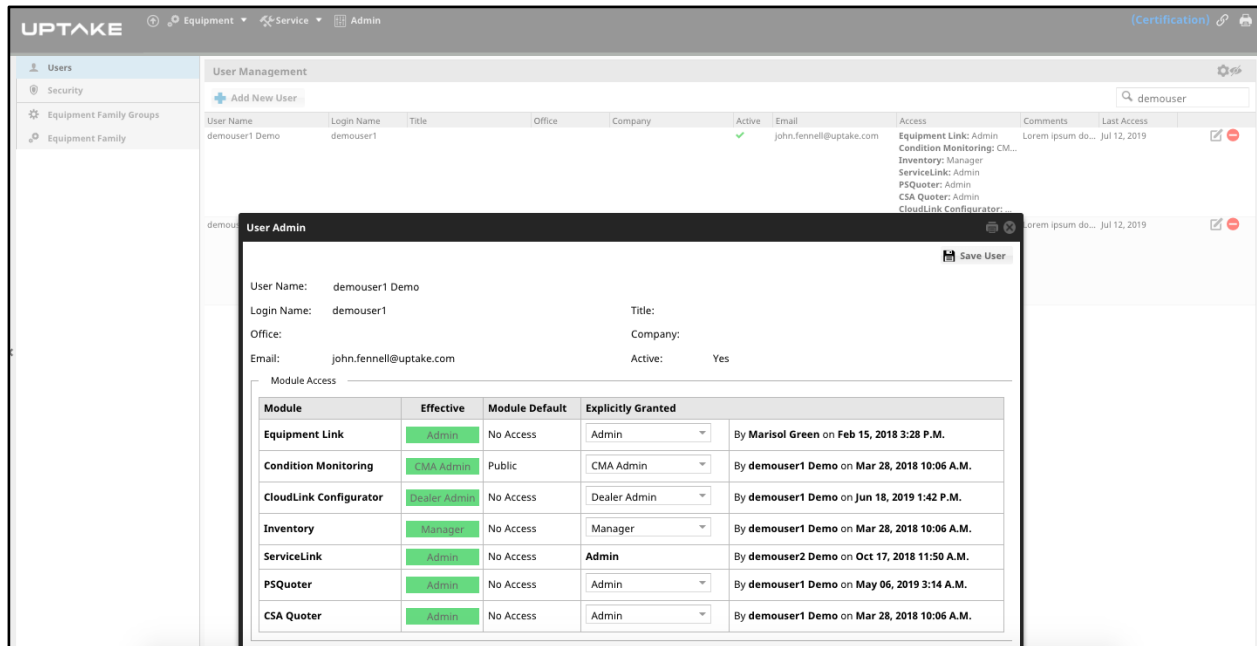


A list of users will display. You can click on the user's name in the list or type their name in the search box in the upper right blank.

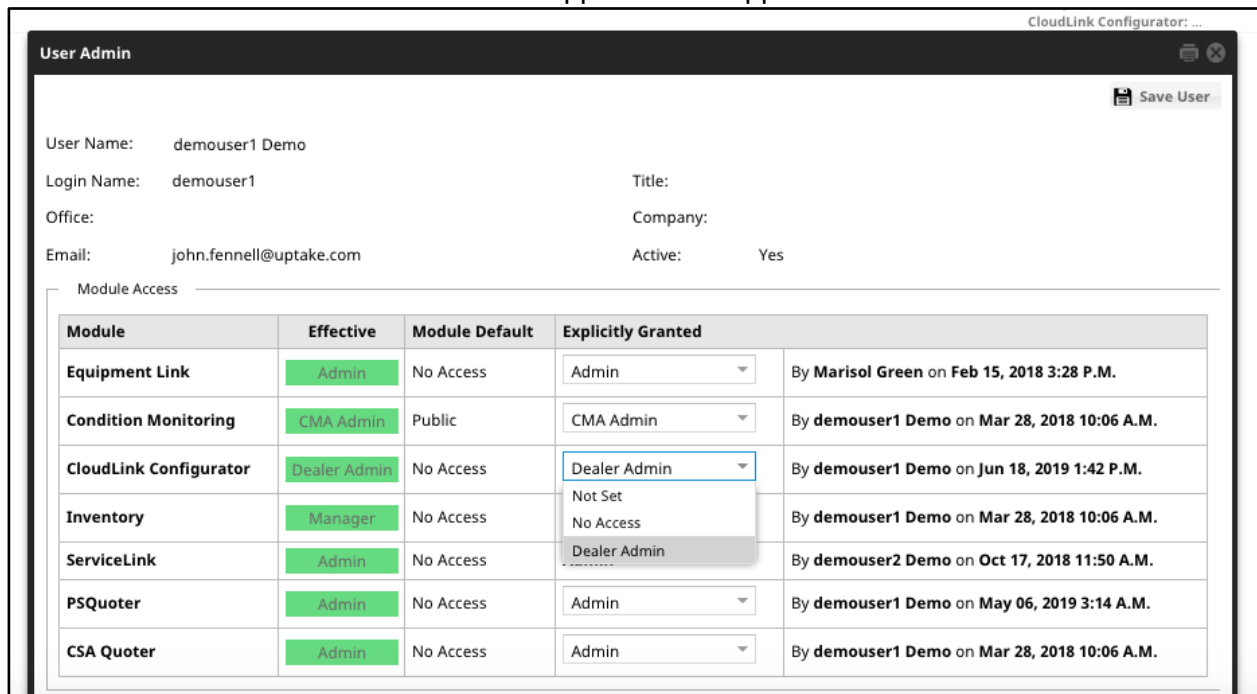
Note: The Search box scans via username only.



Once you have identified the user's name, click on the edit button to the right and a modal window will appear in the middle of the screen.



Locate the **Explicitly Granted** column. Click on the dropdown to reveal the options of access for a user. Note that these can differ from application to application.



This particular example can be set to either:

- **Dealer Admin**
- **Not Set**
- **No Access**

A closer view:

Condition Monitoring	CMA Admin	Public	CMA Admin	By demouser1 Demo on Mar 28, 2018 10:06 A.M.
CloudLink Configurator	No Access	No Access	No Access	By demouser1 Demo on Jun 18, 2019 1:42 P.M.
Inventory	Manager	No Access	No Access	By demouser1 Demo on Mar 28, 2018 10:06 A.M.
ServiceLink	Admin	No Access	Dealer Admin	By demouser2 Demo on Oct 17, 2018 11:50 A.M.

Once the desired selection is made, click on the Save User button in the upper right-hand corner.



Please note that it is up to the preference of the Dealer Admin whether to use COTI or EL/CMP if the dealership subscribes to both applications. Both access the same database and will update it.

If your dealership does not have either COTI or EL/CMP, please open a ticket with Uptake Customer Service and the change request will be made.

## CUSTOMER SERVICE CONTACT INFORMATION

Uptake Customer Service  
312-242-4000  
[support@uptake.com](mailto:support@uptake.com)